

Toolkit: Creating Staff-led Values



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Start with the “Why”

- E.g. Aligned Customer Experience, Common Language

Set yourself up for success:

- Visionary framework
- Executive support
- Collaborative, committed core team

Step 1: Identify what matters to your staff and community. *What is important to your stakeholders?*

A) Leveraging sources of community data

How We Did It	How You Could Do It
<ul style="list-style-type: none">○ Collected community data from already available sources (e.g. community reports)○ Used data from market research, website stats and brand focus groups○ Compiled data from three different sources	<ul style="list-style-type: none">○ Interview stakeholders one-on-one○ Conduct focus groups○ Distribute social media, email and print surveys○ Review customer feedback forms/surveys

NOTES



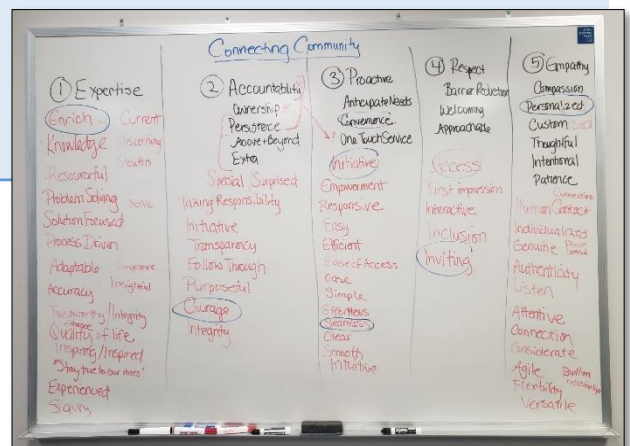
b) Exploratory information-gathering

How We Did It	How You Could Do It
<ul style="list-style-type: none"> Engaged all departments in group discussions, led by core team Used open-ended questions to target pre-existing values Collected stories and key concepts that demonstrated exceptional customer experience at the organization 	<ul style="list-style-type: none"> Ask staff to reflect independently on existing organizational values Internal surveys (administered online through email or intranet) Staff interviews Facilitate brainstorm activities with staff

Step 2: Derive broad concepts. *What patterns do you see?*

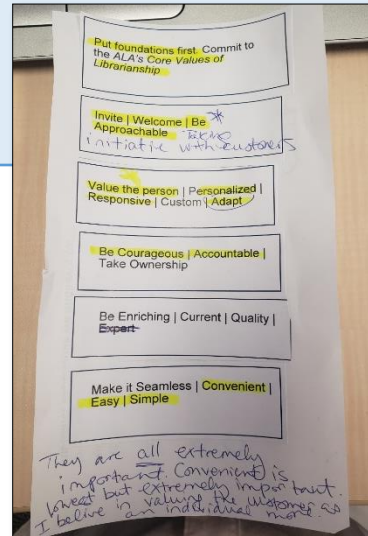
How We Did It	How You Could Do It
<ul style="list-style-type: none"> Looked for patterns, consolidated related concepts and clustered themes in multiple iterations Completed card-sort (user experience design technique) several times Engaged in brainstorming session to name concepts Identified the most common occurring themes and drilled down to five main value principles and potential naming conventions, then reviewed with staff Core team filtered research to create the first prototype of the value system 	<ul style="list-style-type: none"> Dotmocracy (voting with dots) Word cloud Gain consensus through group discussion

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Step 3: Iteration and Feedback. *Did we get it right?*

How We Did It	How You Could Do It
<ul style="list-style-type: none"> ○ Core team tested prototype through staff interviews ○ Used open-ended and probing questions (e.g. What parts do you like? What is missing?) ○ Revised & re-iterated 	<ul style="list-style-type: none"> ○ Surveys/Polls ○ Group discussions ○ Prototyping



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Step 4: Compile feedback, adapt Values, and finesse. *Are these reflective and presentable?*

How We Did It	How You Could Do It
<ul style="list-style-type: none"> ○ Synthesized feedback based on user interviews (e.g. added clarifying statements) ○ Talled responses and used consensus to adapt Values ○ Collaborated with Communications department to refine and finesse language 	<ul style="list-style-type: none"> ○ Heat map ○ Leadership input on draft ○ Community input on draft ○ Use a different team ○ Appoint a decision-maker ○ Evaluate against vision

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Step 5: Sharing the message. *How do we communicate to our stakeholders?*

How We Did It

- Throughout the process, provided progress reports with staff: shared brief written updates and pictures of the core team working on the project on our intranet to increase and maintain transparency
- Leveraged peer-to-peer communication and storytelling: Interviewed staff about how they see the Values in their everyday and filmed their responses to show to all staff
- Unveiled the Values through the staff video during a presentation at annual employee-wide Staff Development Day
- Gave each employee a postcard-sized takeaway with the Values as a reminder (strategically sized to be kept in notebooks as a bookmark, at desks, on-hand).

How You Could Do It

- Release 'teasers' in the lead up to the unveiling (e.g. Place 'coming soon' messaging and hints in a variety of communications channels to pique interest and create buzz)
- Use top-down communication tactics: Use executive-to-staff channels (CEO blog, eNewsletter), or interview your CEO with the same questions for staff and film responses
- Use storytelling in a different way: interview staff and write up their responses for a staff blog piece
- Unveil the Values during a presentation at staff meetings, a Town Hall, in one-on-ones, or do a roadshow to all branches
- Post the Values in shared spaces (ex. bulletin boards or digital screens in staff or lunch rooms)

The Five

1. Inclusion

We invite and embrace everyone in our community.

2. Personalization

We value each person and their unique experience.

3. Quality

We strive for excellence in everything we do.

4. Ownership

We boldly take responsibility.

5. Seamlessness

We make it simple.

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Step 6: Bringing the Values to Life. *How do we incorporate the Values in our everyday?*

How We Did It	How You Could Do It
<ul style="list-style-type: none">○ Integrated the Values formally, for example: the Values are in the organization's Core Program Development Framework○ Integrating Values into procedures and processes○ Used the Values internally to explain "the why"○ Evaluated service using Values as guidelines○ Integrated them into training, related documentation, and customer service onboarding	<ul style="list-style-type: none">○ Discuss them in department meetings.○ Assign them to staff (e.g. "be the ambassador of inclusion")○ Integrate them into Performance Reviews and Goal Setting○ Award staff or teams on exemplifying values○ Integrate values into recruitment practices○ Ask staff to make recommendations based on values

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Recommended Resources

Brown, T. (2009). *Change by design*. New York, NY: Harper Collins.

Brown, B. (2018). *Dare to lead: Brave work, tough conversations, whole hearts*. New York, NY: Random House.

Disney Institute, & Kinni T. (2011). *Be our guest: Perfecting the art of customer service*. Los Angeles, NY: Disney Editions.

Edmondson, A. (2012). *Teaming: How organizations learn, innovate, and compete in the knowledge economy*. San Francisco, CA: John Wiley & Sons, Inc.

Friedman, A. (2018). How to establish values on a small team. *Harvard Business Review*. Retrieved from <https://hbr.org/2018/04/how-to-establish-values-on-a-small-team>

Interact Software. *14 steps to great internal communications*. eBook. Retrieved from: <https://www.interact-intranet.com/wpcontent/uploads/2018/01/14-stepsto-great-internalcommunications-Interact-Software.pdf>

Lencioni, P. (2002). Make your values mean something. *Harvard Business Review*, (July 2002). Retrieved from <https://hbr.org/2002/07/makeyour-values-mean-something>

Sinek, S. (2009). *Start with why: How great leaders inspire everyone to take action*. New York, NY: Portfolio.

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